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ABSTRACT

To explore options to establish Federal Individual Training Accounts (ITAs), a study reviewed Pennsylvania's Individual Learning Accounts, Cedar Company's Individual Learning Accounts, ITAs under the Workforce Investment Act, and the United Kingdom's Individual Learning Accounts. ITAs were defined as a base amount of resources--dollars or hours--set aside for the use of individual employees for their learning and development. ITAs could provide them more choice and the opportunity to be more proactive in identifying and determining how to meet their development needs and could provide managers flexibility to design development programs customized to the organization's and employees' needs. Other options for ITAs were service contracts; contributions tied to length of service; education awards; training fund set-asides; and reimbursement programs. The study determined that addressing certain issues would provide the basis for determining feasibility of a government-wide implementation, considering the differences between training and learning; training as part of an organizational system; equitable training for all employees; ITA as entitlement or benefit; portability of ITAs; and financing ITAs across all departments and agencies. The following recommendations were made regarding ITAs in the federal government: goals of the proposed initiative should be broadened to support lifelong learning; and agencies should pilot lifelong learning approaches to identify best practices. (YLB)

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ED 447 332

Report On

Federal Individual Training Accounts

Prepared by:

Subgroup on Federal Individual Training Accounts

President's Task Force on

Federal Training Technology

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
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Executive Summary

Background

President William J. Clinton's January 12, 1999, Executive Order 13111, "*Using Technology to Improve*

Training Opportunities for Federal Government Employees," established a task force to explore how Federal training programs, initiatives, and policies can better support lifelong learning through the use of learning technology.

The Federal Training Technology Task Force, consisting of heads of Federal government departments and agencies or their representatives, is charged with developing a policy to "make effective use of technology to improve training opportunities for Federal Government employees." One of the specific tasks to be addressed by the Task Force is to:

"Develop options and recommendations for establishing a Federal Individual Training Account for each Federal worker for training relevant to his or her Federal employment. To the extent permitted by law, such accounts may be established with the funds allocated to the agency for employee training. Approval for training would be within the discretion of the individual employee's manager. Options and recommendations shall be reported no later than six (6) months from the date of this order."

The Task Force created a focus area subgroup to explore options for the establishment of Federal Individual Training Accounts (FITAs). This report presents the Subgroup's findings.

Individual Training Accounts for the Federal Government

To establish a baseline of information on the current use of ITAs in the public and private sectors, the Subgroup studied examples of existing ITA models. The ITA models reviewed were Pennsylvania's Individual Learning Accounts, Cedar Company's Individual Learning Accounts, Individual Training Accounts under the Workforce Investment Act, and the United Kingdom's Individual Learning Accounts.

In conducting its review and analysis, the Subgroup specifically sought to answer the following questions:

- What are Individual Training Accounts (ITAs)?
- Are ITAs a viable means of "improving] training opportunities for Federal employees"?

- What are the options for ITAs?
- Is it feasible to implement ITAs governmentwide at this time?

The Subgroup defined ITAs as a base amount of resources whether expressed in terms of dollars or hours, set aside for the use of individual employees for their learning and development.

After its research, the Subgroup concluded:

- Early indications from the research show that ITAs may be a positive addition to an agency's toolbox of approaches for addressing the training needs of its workforce. ITAs may provide employees more choice and the opportunity to participate more proactively in their own development. Managers could also use ITAs to design development programs to meet their organization's and their employees' needs. However, the Subgroup concluded that there is a need for more empirical data to determine the scope and practicality of using ITAs in the Federal government.

- Due to the limited number and early implementation stage of the ITA programs found for evaluation, the results and impact data available were not sufficient to conclusively assess the value added by this approach.

- The implementation strategy for ITAs in the Federal government should have the benefit of the research and recommendations of the other Task Force subgroups, which are scheduled for reporting in July 2000. Among the issues these subgroups will be addressing are integrating training in the annual budget process, procurement barriers, and learning technology as a tool for more and better access to training, all of which will impact an agency's training strategy.

The Subgroup's deliberations raised several issues that need to be addressed during the empirical data gathering stage. Specifically:

- Should ITAs address a broader definition so as to incorporate the current definition of ***learning*** as expressed in the Administration's Lifelong Learning Initiative--non-classroom, mentoring, on-the-job training, etc.?

- How can ITAs be administered in a way that meets the requirements of GPRA, which links all agency initiatives to the performance of its mission?

- Can ITAs be administered in a way that avoids the perception of inequity in the allocation of resources as agencies address discretionary and mandatory training needs using this new tool?

- Could ITAs be interpreted as an entitlement or benefit? The Subgroup was concerned that viewing ITAs as entitlements would force allocations of monies even when not necessary to advance mission accomplishment.

- Should ITAs be portable? The current thinking is that the ability to move ITAs from agency to agency would require some change to current appropriations law.

- How will ITAs be financed across agencies? A funding plan for ITAs would need to take into account the substantial variance from one agency to another in terms of the ability to underwrite the cost of staff development activities.

Recommendations

The Subgroup proposes the following recommendations regarding ITAs:

- ***The goals of the proposed initiative should be broadened to support not merely training opportunities but lifelong learning.*** The Subgroup recommends that the proposed initiative be reframed to address the concepts of lifelong learning. This requires broadening the scope to encompass all types of learning and all modes of delivery, including both formal and informal training and technology-based approaches. This will allow agencies not simply to focus on meeting training needs for a specific job, but to prepare their workers to meet future work demands.

- ***Agencies should pilot lifelong learning approaches to enable the identification of best practices.*** The Subgroup recommends that agencies embark on pilot efforts to evaluate the use of ITAs, as well as other new approaches to lifelong learning, such as investment plans, contract strategies, individual development plans (IDPs), or other innovative models. In designing, implementing, and reporting on their pilots, agencies should specifically address some or all of the issues identified in this report and ensure that employees with disabilities have equal access to training opportunities.

ITA pilots would begin no later than March 1, 2000, with preliminary evaluations due by September 30, 2000. For pilots launched after March 1, 2000, preliminary evaluations would be due as soon as possible thereafter, but no later than six months after launch date.

- ***The U.S. Office of Personnel Management should continue as the central coordinating agency for the lifelong learning initiative.*** The Subgroup recommends that the U.S. Office of Personnel Management (OPM) maintain its current responsibility for this initiative. In addition to reviewing agency pilot plans, OPM would also be responsible for analyzing and reporting the results of agency pilot programs and issuing guidance, by March 2001, on lessons learned to date with ITAs and future implementation of ITAs and other lifelong learning programs.

- ***The President should consider issuing an Executive Memorandum inviting Cabinet-level agencies to volunteer for pilot programs.*** An invitation that comes from the President will emphasize the crucial nature of this initiative and inspire strong support governmentwide. The Subgroup recommends that a Presidential memo be issued to the heads of all Cabinet-level agencies explaining the rationale for instituting lifelong learning programs, identifying the flexibility currently available within existing rules and regulations, describing models and methods, inviting pilot proposals, and reaffirming the role of OPM as the lead agency for the initiative. The Subgroup recommends that this memo be issued by September 1, 1999, to allow agencies enough time to establish their pilot programs in FY 2000.

Section 1:

Background

President William J. Clinton's January 12, 1999, Executive Order 13111, "*Using Technology to Improve Training Opportunities for Federal Government Employees*," established a task force on Federal training

technology to explore how Federal training programs, initiatives, and policies can better support lifelong learning through the use of learning technology.

The Federal Training Technology Task Force, consisting of the heads of Federal government departments and agencies or their representatives, is charged with developing a policy to "make effective use of technology to improve training opportunities for Federal Government employees." Specifically, the Task Force has been mandated to:

- Develop strategies to improve the efficiency and availability of training opportunities
- Form partnerships to promote the development and use of high-quality training opportunities
- Analyze the use of technology in existing training programs to determine what changes may be necessary
- Recommend standards for training software and associated services
- Evaluate research and demonstration activities related to Federal training technology
- Identify and support cross-agency training areas that would benefit from new instructional technologies
- Promote existing and new procurement vehicles that allow agencies to provide innovative training opportunities
- Recommend changes that may be needed to existing procurement laws related to training

In addition, Section 2 (b) of the Executive Order requires the Task Force to:

"Develop options and recommendations for establishing a Federal Individual Training Account for each Federal worker for training relevant to his or her Federal employment. To the extent permitted by law, such accounts may be established with the funds allocated to the agency for employee training. Approval for training would be within the discretion of the individual employee's manager. Options and recommendations shall be reported no later than six (6) months from the date of this order."

The Task Force established a focus area subgroup to explore the use of ITAs in the Federal Government. Ms. Patricia Lattimore, Assistant Secretary for Administration and Management, U.S. Department of Labor, was the Subgroup's chair. Ms. Lattimore was joined by representatives from the U.S. Departments of Commerce, Defense, Education, Health and Human Services, Housing and Urban Development, Interior, Justice, Transportation, and Treasury, and from the National Aeronautics and Space Administration, the National Partnership for Reinventing Government, the U.S. Office of Management and Budget, and the U.S. Office of Personnel Management (Appendix A lists the subgroup members).

The Subgroup met four times during the time period from April to June. After defining the key issues in its first meeting, the Subgroup divided itself into four working groups to examine ITAs from these perspectives:

- The purpose and scope of the Subgroup's task
- Funding and tax implications of ITAs
- Delivery systems, equity issues, labor relations, and portability
- ITA administration issues and identification of core and discretionary services.

This report documents the research and findings of the Subgroup. It also presents a discussion of issues concerning the implementation of Individual Training Accounts (ITAs) in the Federal Government and the Subgroup's recommendations.

Section 2:

Individual Training Accounts (ITAs)

for the Federal Government

Federal agencies deliver a rich array of both formal and informal training to their employees. Training varies significantly from agency to agency, with much of it addressing agency-specific topics (such as training EPA and OSHA engineers in chemical hazards and in-plant safety techniques). Departments and agencies offer the following types of formal training:

- Job-specific skills and procedures
- Policy and practices
- Interpersonal communication
- Basic skills
- Computer literacy
- Management development

An OPM study in Fiscal Year 1997, *Appropriateness of Non-Technical Training*, found that most agency training is technical in nature, often taking the form of cross-training or re-training to develop or enhance skills currently needed by the agency.[1]

A significant number of agencies--the Department of Defense and the National Aeronautics and Space Administration (NASA) are two examples--have come to view training as a less structured process, the goal of which is advancing workers beyond linear performance of their daily tasks. These agencies use techniques such as on-the-job learning, mentoring, benchmarking, distance learning, and developmental assignments to augment traditional classroom methods. Another example is OPM's Core Competency Training and Development Model, which contains three levels and four competencies designed to give employees the skills necessary to deliver value-added client services. Managers should work with employees to develop their plans for acquiring needed competencies; this is an excellent tool for assuring an agency-wide base level of expertise. Many agencies are also finding that more training in shorter training cycles is needed to remain current with changes. Other agencies offer high level training in

advanced technical capability and essential management concepts.

Improved approaches to employee learning are indeed taking a firm hold in the Federal government, but agencies differ in their allocation of resources to training. Further, budget tightening remains a constraint to training, which is often curtailed when budgets are cut.

It was in this context that the Subgroup reviewed the feasibility and appropriateness of Individual Training Accounts (ITAs) for Federal employees. This section provides some brief examples of existing ITAs and seeks answers to the following questions:

- What are Individual Training Accounts (ITAs)?
- Are ITAs a viable means of "improving] training opportunities for Federal Government employees"?

- What are the options for ITAs?
- Should ITAs be implemented governmentwide at this time?

2.1 What are Individual Training Accounts?

Individual Training Accounts are a relatively new concept, and there are not many examples of ITA programs with a long track record. The Subgroup reviewed the following four program examples, drawn from both public and private sectors:

- ***Pennsylvania Individual Learning Accounts (ILAs).*** There are two pilot ILA programs in the Commonwealth of Pennsylvania. The pilot in Eastern Pennsylvania targets fast-growing, high-technology firms that want to invest in ILAs to retain highly-skilled workers who need more education and training in order to keep their skills and knowledge base current. The pilot in York County targets minimum wage entry level workers who need continuing education and training in order to achieve their career potential. An account, held in the employee's name, is funded through contributions made by the employee, the employer, and the state government. The employee identifies needed training and if the employee wishes to use the employer's monies, then the employee submits a request for employer approval and funds are drawn from the ILA. Since the ILA is in the name of the individual, ILA contributions from the individual and the state could be used to cover the cost of continuing education. The plan is both flexible and portable. Employees identify their own training needs, find the training provider, and initiate the process of drawing ILA funds. As employees move from one employer to another, ILAs remain in the name of the individuals. The program has had limited use; only 50 workers have joined so far. Given the early stages of this project, it would be premature to draw conclusions about ILAs.

- ***Cedar Company's Individual Learning Accounts (ILAs).*** Cedar Company, a high technology firm, has established an ILA program for its workforce of five thousand plus. The company makes contributions to learning accounts and encourages employees to use the account to acquire new skills. Initially introduced as a fringe benefit, ILAs have become the primary vehicle for staff development. The program is financed through corporate allocations to functional areas. Managers meet with employees to discuss learning activities and to negotiate formal learning contracts. Employees draw funds from ILAs and share information related to their training experiences throughout the organization.

- ***Individual Training Accounts under the Workforce Investment Act.*** The Workforce Investment Act of 1998 (WIA), the successor to the Job Training Partnership Act, represents a major reform to the publicly funded workforce investment system. Among its key provisions, WIA mandates the creation of ITAs administered through a network of local service providers. ITAs are built on a voucher model; no contributions by the individual are made directly to the cost of training. Unlike the Pennsylvania model, which is more flexible, the WIA ITA limits the individual's selection of training programs to a pre-approved list. The account is not the property of the individual and is not portable from one community to another. Since the Act has only been in place a year, interested agencies will require additional time to develop a broader base from which to evaluate the utility of ITAs.

- ***United Kingdom's Individual Learning Accounts (ILAs).*** Similar to the Pennsylvania program, this UK pilot promotes lifelong learning for all UK workers. Funding of the ILAs is shared by employees, their employers, and the government. Employees can draw funds from the account to pay for training activities, which must be related directly to job functions. Based on the success of this pilot, the United Kingdom is making ILAs available at the national level.

The Subgroup identified the following elements of the ITA programs studied:

- Each established a base amount of funding.
- Each is expressed in dollars.
- Each establishes a set aside for the use of a specific individual.
- Each is designed for the purpose of learning and development.

While all the ITA programs reviewed by the Subgroup are funded in terms of dollars, the Subgroup concluded that limiting the definition of ITAs to dollar accounts would be too restrictive. Therefore, for purposes of this report, the Subgroup developed the following definition:

An Individual Training Account is a base amount of resources, expressed in terms of dollars or hours, set aside for the use of employees for learning and development.

2.2 Are ITAs a viable means of improving training opportunities for Federal employees?

The Subgroup concluded that ITAs may be a positive addition to an agency's toolbox of approaches for addressing the training needs of its workforce. ITAs may provide employees more choice and the opportunity to be more proactive in identifying their development needs and determining how those needs can be met. ITAs could also provide managers with the flexibility they need to design development programs customized to the organization's and individual employees' needs.

However, the Subgroup found only a limited number of ITA models, most of which are in the early stages of implementation. The data available is not sufficient to assess the real value added by an ITA approach, to determine the extent to which ITAs should be implemented, or to ascertain conclusively that ITAs are indeed practicable in the Federal setting.

2.3 What are the options for ITAs?

The Subgroup considered other options for making learning and development opportunities available to individual employees. These include the following programs:

- ***Service contracts.*** To support the training of future employees, the Commissioned Corps of the Public Health Service (PHS) has instituted the "Senior Commissioned Officer Student Training and Extern Program" (COSTEP). Under this program, the Commissioned Corp of the PHS pays a salary while program participants are in the last year of their educational programs, in return for which, as employees, they will work two days for every day of salary received while they were in school. If they fail to meet this commitment, they return double the amount they received during their study.

- ***Contributions tied to length of service.*** Although not directly tied to training, the Peace Corps has created a fund to help Peace Corps volunteers readjust to life in the United States when their program is over. For each month of service, the Corps deposits $225 into an escrow account for the Corps member. This fund is immediately available when the individual withdraws from the Corps.

- ***Education Awards.*** Americorps has a model similar to that of the Peace Corps. It provides an incentive to volunteers in the form of a contribution to educational expenses. The amount can be up to $4,725, based on the number of hours worked. The award is issued in the form of a voucher upon completion of service and can be used for up to seven years.

- ***Training Fund Set-Aside.*** The Internal Revenue Service (IRS) intends to set aside two percent of the agency's training budget for a Human Resources Investment Fund. The effort is still being planned, and the agency has not yet established how employees can access the fund, but the objective is to encourage them to play a role in identifying and meeting their own training needs.

- ***Reimbursement Program.*** Motorola Corporation's reimbursement program is not structured as a formal account, but it pays employees back for job-related training expenses. The program is managed through a decentralized training system that allows each subdivision to focus on its unique training needs. The company also offers in-house training opportunities that include traditional classroom-based instruction and distance learning methods. This approach is intended to provide flexibility for the employee.

The Subgroup concluded that while the options studied are programs independent of any ITA, conceivably, these programs could also be set up as part of, or in support of, ITAs.

2.4 Is It feasible to implement ITAs governmentwide at this time?

The Subgroup's deliberations raised several issues that need to be addressed during the pilot stage:

- ***The differences between training and learning.*** Training consists not only of classroom instruction, computer-based education, and self-paced study, but also informal on-the-job experiences. Together, formal and informal development activities can be seen as "learning." In the view of the Subgroup, a complete understanding of the scope and intent of staff development should be established across all departments and agencies before Individual Training Accounts can be adopted government-wide. Use of ITA pilots or demonstration projects can enhance understanding and facilitate sounder policy in the future.

- ***Training (or learning) as part of an organizational system.*** It is important to have training policies and strategies that meet the employee's needs and at the same time advance the organization's goals and objectives. Should human development activities be limited to those directly related to an employee's job responsibilities? Should a broader approach to lifelong learning be taken? Can training that is not job-specific be accommodated? If so, what are the parameters that regulate training choices? The responses to these and other questions can help to determine the potential of ITAs.

- ***Ensuring equitable training exposure for all employees.*** It is important to account for the costs and benefits of meeting the needs of diverse groups. For example, there may be a substantial difference in the cost of training support staff and the cost of training highly specialized professionals and executives. Funds must be managed to ensure equitable distribution and maximum value.

- ***The ITA as entitlement or benefit.*** Significant concern was expressed that employees may begin to view ITAs as entitlements, with the possibility of attendant misunderstandings or problems. The Subgroup was concerned that viewing ITAs as entitlements would force allocations of monies even when not necessary to advance mission accomplishment. Another issue to be resolved is whether distributions from an ITA are taxable to the employee.

- ***Portability of ITAs.*** The Subgroup does not endorse ITA portability across agencies. If ITAs are allowed to move with employees from one agency to another, complex operational systems must be developed and put in place to support the practice. Portability of funds from one agency to another has implications for augmenting the receiving agency's budget, a prohibited practice in the Federal government.

- ***Financing ITAs across all departments and agencies.*** One of the greatest challenges to establishing ITAs is the financing of the system. Many training budgets are already strained, and there is substantial variance from one agency to another in terms of the ability to underwrite the cost of staff development activities. A plan for the funding of ITAs would have to allocate sufficient resources for every employee.

The Subgroup concluded that addressing these questions would provide the basis for determining the feasibility of a governmentwide implementation. Because these issues remain unresolved, the Subgroup believes that the potential of ITAs as a vehicle for employee development should be studied more carefully. Any ITA implementation strategy should have the benefit of the research and recommendations of the other Task Force subgroups, which are scheduled for reporting in July 2000. Among the issues these sub-groups will be addressing are integrating training in the annual budget process, procurement barriers, and learning technology as a tool for more and better access to training.

Section 3:

Recommendations

The Subgroup proposes the following specific recommendations regarding ITAs in the Federal government:

- ***The goals of the proposed initiative should be broadened to support not merely training opportunities but lifelong learning.*** In both the private sector and the government, interest is turning away from narrow, task-specific training and toward lifelong learning approaches. Rather than simply focusing on meeting training needs for a specific job, organizations are moving towards preparing their workers to meet future work demands. The Subgroup recommends that the proposed initiative be reframed to address the concepts of lifelong learning. This requires broadening the scope to encompass all types of learning and all modes of delivery, including both formal and informal training and technology-based approaches.

- ***Agencies should pilot lifelong learning approaches to enable the identification of best practices.*** The Subgroup believes that the ITA is a concept that merits further study to gather empirical data before considering governmentwide implementation. Therefore, the Subgroup recommends that agencies embark on pilot efforts to evaluate the use of ITAs, as well as other new approaches to lifelong learning, such as investment plans, contract strategies, individual development plans (IDPs), or other innovative models. In designing, implementing, and reporting on their pilots, agencies should specifically address some or all of the issues identified in the previous section of this report and should incorporate measures to ensure that employees with disabilities have equal access to training opportunities.

Interested agencies would begin pilot programs no later than March 1, 2000 and submit preliminary evaluations of their pilots by September 30, 2000. Agencies that launch pilots after March 1, 2000 would submit preliminary evaluations as soon as possible thereafter, but no later than six months after launch date.

Agencies would also be encouraged to integrate their pilot programs with the strategic and annual performance plans submitted in response to Government Performance and Results Act (GPRA) requirements. The Subgroup also suggests that pilot agencies use collaborative approaches in which they partner with each other, the private sector, and stakeholder groups to achieve economies of scale and ensure wide-based support.

- ***The U.S. Office of Personnel Management should continue as the central coordinating agency for the lifelong learning initiative.*** The Subgroup recommends that the U.S. Office of Personnel Management (OPM) maintain its current responsibility for this initiative. In addition to reviewing agency pilot plans, OPM would also be responsible for:

Soliciting input from all agencies and advising the President on methods for accelerating learning opportunities for government workers

Coordinating and establishing mechanisms for fostering partnerships among federal agencies, stakeholders, and the private sector

Analyzing and reporting the results of agency pilot programs

Issuing guidance, by March 2001, on lessons learned to date with ITAs and future implementation of ITAs and other lifelong learning programs

- ***The President should consider issuing an Executive Memorandum inviting Cabinet-level agencies to volunteer for pilot programs.*** An invitation that comes from the President will emphasize the crucial nature of this initiative and inspire strong support governmentwide. The Subgroup recommends that a Presidential memo be issued to the heads of all Cabinet-level agencies explaining the rationale for instituting lifelong learning programs, identifying the flexibility currently available within existing rules and regulations, describing models and methods, inviting pilot proposals, and reaffirming the role of OPM as the lead agency for the initiative. The Subgroup recommends that this memo be issued by September 1, 1999, to

allow agencies enough time to establish their pilot programs in FY 2000.

Conclusion

The Subgroup recognizes the likely potential of ITAs in improving the development opportunities of Federal employees. However, the limited data available about ITA programs was not sufficient to conclusively assess the value added by this approach. In addition, issues being addressed by other Task Force subgroups such as procurement, financial investment, and learning technologies, will likely have a significant impact on how we would proceed with ITAs in the Federal government.

The Subgroup, therefore, considers the above to be interim recommendations pending the recommendations of the other Task Force subgroups and the results of the ITA pilots.

Appendix A:

FITA Subgroup Members

Patricia Lattimore U.S. Department of Labor (Chair)

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Reference Information for the following Appendices

Appendix B:

Pennsylvania ILA Pilot Program Handbook

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Appendix C:

Excerpt on Cedar Company's

Individual Learning Accounts from *Beyond the Pay Raise: Retention Tactics for IT Professionals*

Contact: Corporate Leadership Council

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Catalog Number: 070-191-906

Appendix D:

Federal Regulations on Individual Training Accounts Under the Workforce Investment Act

Reference: Federal Register 20 CFR Part 652, Workforce Investment Act

http://www.access.gpo.gov/nara/cfr/cfr-table-search.html

Appendix E:

Information on the United Kingdom's

Individual Learning Accounts

Reference: http://www.lifelonglearning.co.uk/ila/front.htm

Appendix F:

Excerpt on Individual Learning Accounts from *Compelling Careers: Workforce Management Structures of the New "Employers of Choice"*

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1. Office of Personnel Management, "Appropriateness of Non-Technical Training," 1997.

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